



Shared Services Implementation Checklist

This document provides a checklist of things to be covered when implementing shared services within an organization and effectively managing the change initiative.

Shared Services Implementation Checklist

- ☐ List and prioritize the business drivers for establishing shared services
- ☐ List and analyze the benefits expected to be derived out of the shared services set-up
- ☐ Determine a budget for the setting up shared services
- ☐ Set a time frame for realizing benefits out of shared services
- ☐ Assign a person and establish a team to drive the shared services initiative
- ☐ Assign the designation of the person heading the shared services initiative
- ☐ Determine if the setting up of shared services operations will require the involvement of an external consultant
- ☐ List and prioritize activities that can transferred to shared services
- ☐ Select activities that logically fit together such as payroll and benefits processing
- ☐ Analyze if the activities are strategic or transactional in nature
- ☐ Analyze the level of customization the activity will require
- ☐ Analyze and determine if the organization will need to procure technology to deliver services through shared services
- ☐ Analyze the cost of maintaining the technology in-house
- ☐ Evaluate the benefits of outsourcing versus maintaining in-house shared services
- ☐ Estimate the cost savings that would result from setting up of shared service
- ☐ Estimate the improvement in service-delivery time that would result from shared services
- ☐ Evaluate the changes in organizational structure that would result due to the setting up shared services
- ☐ Evaluate if the establishing shared services would lead to any reductions or changes in existing jobs

Change Management Checklist

- ☐ Secure senior management commitment to act as a sponsor of the shared services initiative
- ☐ Identify all stakeholders that will be affected by shared services implementation and assess the degree of impact
- ☐ Align the setting up of shared services with the current organizational culture
- ☐ Assess if the existing HR policies, practices and processes (e.g., compensation, benefits, performance) support shared services implementation
- ☐ Assess if the organization has the infrastructure to support and enable employees, i.e., provide them with the appropriate tools and training
- ☐ Establish a process for managing conflicts in case they arise
- ☐ Establish a framework and process for measuring the success of the shared services initiative

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